



*United States Bankruptcy Court
Eastern District of Wisconsin
Office of the Clerk*

CM/ECF 4.0-4.2 Upgrade Information for Standing Trustees and Case Trustees

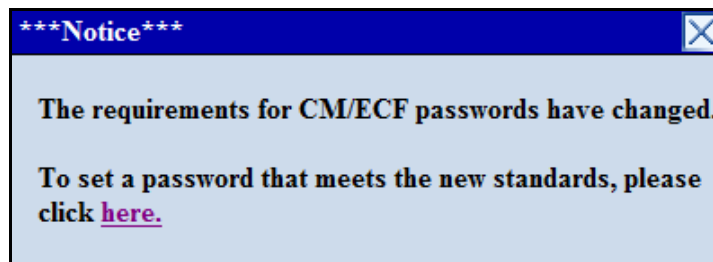
- I. Password Security
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Password Security

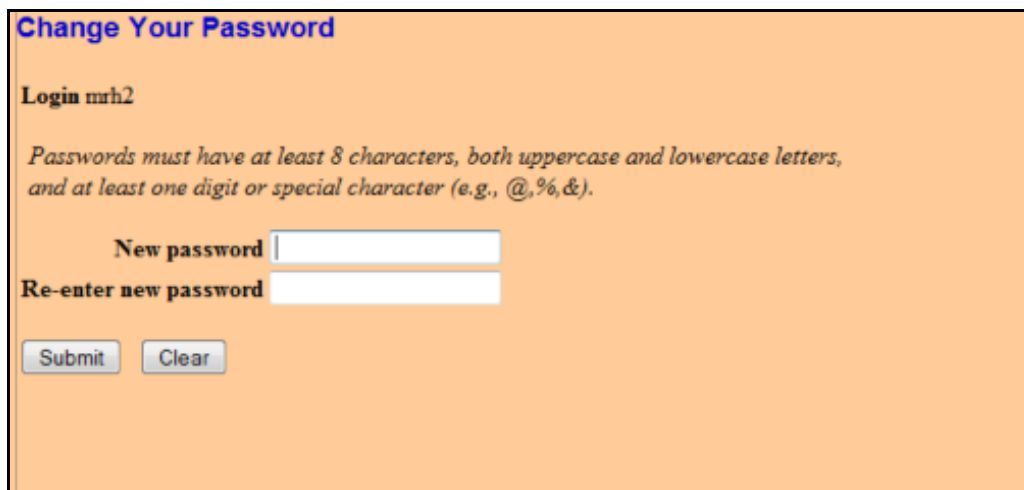
Password security has been improved. All CM/ECF passwords must be changed to meet the new standard. The new standard for passwords contains a minimum of 8 characters, and must include both upper and lower case alphabetic characters. In addition, the new password must contain at least one digit or special character (e.g., 0 - 9, @, #, \$, %, &, *).

There is also a new lockout feature for invalid login attempts. After five invalid login attempts on a particular account, the account is locked out for five minutes. After the timeout period, if an invalid password is given for the account, a new timeout period is started. Every additional invalid password entered after a timeout will increase the duration of the next timeout. This lockout feature is applicable to **all** CM/ECF users.

The first time a user logs in after the court has implemented release 4.1, the following message will appear:



The user can click the **X** at the top and proceed with CM/ECF. However, this message will appear at each login until the password is changed. If the user clicks [here](#), the Change Your Password screen will appear:



If users changed to a stronger password prior to the upgrade, that password can be re-used.

Password Security

The option to change your password under Utilities/Maintain Your ECF Account has been changed. To change a password after the first requirement, users will go to **Utilities/Change Your Password**.



Once you click on **Change Your Password**, you will see this screen:

A screenshot of the 'Change Your Password' form. The form has an orange background. At the top, it says 'Change Your Password' in blue. Below that, it says 'Login mrh2'. A note states: 'Passwords must have at least 8 characters, both uppercase and lowercase letters, and at least one digit or special character (e.g., @,%,&).' There are two input fields: 'New password' and 'Re-enter new password'. At the bottom, there are two buttons: 'Submit' and 'Clear'.

Trustee §341 Filings

Please be advised that the Eastern District of Wisconsin will go forward with the EOUST/AO's version of reporting results from §341 meetings. As a result, our court will no longer support our locally developed reporting program. The **Chapter 13 Trustee Report** will no longer be available. Instead, the Chapter 13 trustees will use the **Trustee's 341 Filings** option.

The image shows a screenshot of a web application menu titled "Bankruptcy Events". The menu items are: [Answer/Response...](#), [Appeal](#), [Batch Filings](#), [Claim Actions](#), [Ch 13 Trustee Report](#), [Creditor Maintenance...](#), [File Claims](#), [Miscellaneous/Other Events](#), [Motions/Applications](#), [Notices](#), [Trustee's 341 Filings](#), [Trustee US Trustee](#), and [Order Upload](#). Two red boxes highlight "Ch 13 Trustee Report" and "Trustee's 341 Filings". A large teal arrow points from the text "This report will no longer be available for Chapter 13 Trustees." to the "Ch 13 Trustee Report" box. Another large teal arrow points from the text "Instead, please use the 'Trustee's 341 Filings' Report." to the "Trustee's 341 Filings" box.

Bankruptcy Events

- [Answer/Response...](#)
- [Appeal](#)
- [Batch Filings](#)
- [Claim Actions](#)
- [Ch 13 Trustee Report](#)
- [Creditor Maintenance...](#)
- [File Claims](#)
- [Miscellaneous/Other Events](#)
- [Motions/Applications](#)
- [Notices](#)
- [Trustee's 341 Filings](#)
- [Trustee US Trustee](#)
- [Order Upload](#)

This report will no longer be available for Chapter 13 Trustees.

Instead, please use the "Trustee's 341 Filings" Report.

The **Trustee's 341 Filings** program has been enhanced to include the option to:

- Continue multiple 341 meetings at one time.
- Add customized text to each docket entry.
- Add standardized text to indicate whether the debtor(s) appeared.
- Sort by time as well as case number.
- Allow Chapter 13 trustees to use the Trustee's 341 Filings program (already available to Chapter 7 trustees).

Trustee §341 Filings

A new option in CM/ECF allows Chapter 13 trustees to now use the **Trustee's 341 Filings** batch program to process their §341 meetings. **Please note that these will be virtual docket entries. As a result, there is no need nor option to attach PDF documents.** Each case on the calendar can be processed at once, or one can select individual cases to docket. Standardized entries for each selection will be automatically docketed to the case.

Continue Multiple 341 Meetings

On the **Trustee's 341 Filings** selection screen, a new “Continue multiple 341 meetings” check box is displayed. A new sort by time option gives flexibility in organizing the cases on the calendar.

The screenshot shows the 'Trustee's 341 Filings' screen in the CM/ECF system. The top navigation bar includes links for Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. The main content area has a date field set to 12/30/2011 and a checked checkbox labeled 'Continue multiple 341 meetings'. Below this is a 'Sort by' dropdown menu with options: Time (selected), Case Number, and Time. At the bottom are 'Next' and 'Clear' buttons.

If this box is checked, a new screen is displayed to allow the trustee to continue 341 meetings for some or all of the cases with meetings on the selected date.

The screenshot shows the 'Continue Multiple 341 Meetings' screen. The header indicates the court is the U.S. Bankruptcy Court, Eastern District of Wisconsin (TEST), and the trustee is Michelle Grace. The date is 12/30/2011. The 'Continue:' section has a date field set to 1/13/2012, a time field set to 9:00 AM, and a location dropdown set to Milwaukee, Room 428. There is a text area for 'Additional docket text' containing the text: 'Due to weather conditions, this 341 meeting was rescheduled for all debtors listed.' To the right of this text are radio buttons for 'Debtor' and 'Joint debtor', each with options for 'appeared', 'absent', and '(No text)'. Below this is a table titled 'Chapter 13 Cases' with columns for Case, Time, and Location. The table lists three cases, all scheduled for 09:00 AM in Milwaukee, Room 428. At the bottom are 'Submit' and 'Clear' buttons.

Case	Time	Location
11-20320-svk Debtor For This Case	09:00 AM	Milwaukee, Room 428
11-20321-svk Barbara Kristine Family	09:00 AM	Milwaukee, Room 428
11-20322-rdm Bill Anderson and Betty Anderson	09:00 AM	Milwaukee, Room 428

This screen displays all cases for which the trustee has a §341 meeting scheduled on the selected day. The trustee makes date, time and location selections. An “Additional docket text” field allows the trustee to add information to the docket text. Additionally, the user may make selections from the radio buttons to the right indicating whether the debtor(s) appeared.

Trustee §341 Filings

Chapter 13 - §341 Processing Screen

If the Chapter 13 trustee runs the report without selecting the “Continue multiple 341 meetings” box, the screen below is displayed. The default setting is “No Action.” “Set All to No Action” may be selected to restore all settings to the default.

The screenshot shows the ECF (Electronic Case Filing) interface for the U.S. Bankruptcy Court, Eastern District of Wisconsin (TEST). The user is logged in as Trustee Michelle Grace on 12/30/2011. The page title is "Chapter 13 Cases". A button labeled "Set All To No Action" is highlighted with a red box. Below the button is a table with columns: Case Number, No Action, Meeting Not Held, Meeting Held, and Continue To. The table lists three cases: 11-20320-svk Debtor For This Case, 11-20321-svk Barbara Kristine Family, and 11-20322-rdm Bill Anderson and Betty Anderson. Each case has radio buttons for the four actions. The "No Action" column is selected for all cases. Below the table are "Submit" and "Clear" buttons.

Case Number	No Action	Meeting Not Held	Meeting Held	Continue To
11-20320-svk Debtor For This Case	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11-20321-svk Barbara Kristine Family	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11-20322-rdm Bill Anderson and Betty Anderson	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

For all options other than “No Action,” a text box and debtor appearance selections are displayed.

The screenshot shows the ECF (Electronic Case Filing) interface for the U.S. Bankruptcy Court, Eastern District of Wisconsin (TEST). The user is logged in as Trustee Michelle Grace on 12/30/2011. The page title is "Chapter 13 Cases". A button labeled "Set All To No Action" is visible. Below the button is a table with columns: Case Number, No Action, Meeting Not Held, Meeting Held, and Continue To. The table lists three cases: 11-20320-svk Debtor For This Case, 11-20321-svk Barbara Kristine Family, and 11-20322-rdm Bill Anderson and Betty Anderson. Each case has radio buttons for the four actions. The "Meeting Held" column is selected for the first case, and the "Meeting Not Held" column is selected for the other two. Below the table are "Submit" and "Clear" buttons. A red box highlights the "Additional docket text" section for the first case, which includes a text box and radio buttons for "Debtor" (appeared, absent, No text). The "No text" option is selected.

Case Number	No Action	Meeting Not Held	Meeting Held	Continue To
11-20320-svk Debtor For This Case	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
11-20321-svk Barbara Kristine Family	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11-20322-rdm Bill Anderson and Betty Anderson	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Trustee §341 Filings

Each case may be reported individually by selecting “Submit” after entering the appropriate information for each individual case, or all together by selecting “Submit” after addressing multiple or all cases for a specific calendar. Once a report has been submitted for a case, the case will fall off the **Trustee’s 341 Filings** report for that specific date. If “Continued To” was used, the case will fall to the report for the continued date.

Proofs of Claim

The CM/ECF screens will incorporate the changes made to the B10 Proof of Claim form revised on December 1, 2011 (implemented in the Eastern District of Wisconsin on Monday, December 5, 2011).

The screenshot displays the CM/ECF Claims Register interface. The top navigation bar includes links for Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below this, a secondary bar contains links for Docket Sheet, Claims Register, Creditor Mailing Matrix, Deadlines/Hearings, Calendar Events, and Associated Cases. The main form area is titled 'Claim Information For' and contains the following fields and sections:

- Claimant Information:** Wheeler Medical Offices, 23 Main Street, Milwaukee, WI 53222.
- Amends Claim #:** A text input field with a 'Find' button.
- Last Date To File:** 03/29/2012.
- Date Filed:** 11/28/2011.
- Last Date To File (Govt):**
- Claimed Section:**
 - Amount Claimed:** A text input field. A callout box identifies this as 'Box 1 (from B10) - Total Amount Claimed'. Below the field is the instruction: 'Enter the Total Amount of Claim as of Date Case Filed (incl. secured, priority, general unsecured & unknown)'.
 - Secured:** A text input field. A callout box identifies this as 'Box 4 (from B10) - Secured Portion of Claim'. Below the field is the instruction: 'If all or part of your claim is secured, enter the secured amount (Box 4 on claim)'.
 - Priority:** A text input field. A callout box identifies this as 'Box 5 (from B10) - Priority Portion of Claim'. Below the field is the instruction: 'If all or part of your claim is entitled to priority, enter the priority amount (Box 5 on claim)'.
- Allowed Section:**
 - Amount Allowed:** A text input field.
 - Secured:** A text input field.
 - Priority:** A text input field.
- Description:** A text input field.
- Remarks:** A text input field.
- Amend options:** Three radio buttons: 'Clear Amounts, Description, and Remarks', 'Clear Description/Remarks', and 'Clear All Amounts'.
- Buttons:** 'Next' and 'Clear' buttons.

Only three amounts are being collected in the data entry.

- Total amount of claim.
- Secured portion of the claim.
- Priority portion of the claim.

It is possible that the Secured and Priority amounts may not equal the total Amount Claimed. There is no longer a box in CM/ECF to enter the unsecured portion of a claim.

Proofs of Claim

Existing claims filed will be converted, meaning that unsecured and unknown amounts previously entered will be greyed out and will remain for historical purposes only.

ECF Bankruptcy Adversary Query Reports Utilities Search Logout				
Proof Of Claim Information For 375 - Max Recovery 2552 Texas Elm San Antonio, TX 78232				
Case Number: 5-10001	Claim No: <u>3</u>	Amends Claim #: <u>3</u> <input type="button" value="Find"/>	Filed By: <u>Creditor</u>	
Last Date To File:	Date Filed: 10/31/2008	Status:		
Last Date To File(Govt): 07/05/2006				
Claimed				
Amount Claimed 6990.55 <i>Enter the Total Amount of Claim as of Date Case Filed (incl. secured, priority, general unsecured & unknown)</i>	Secured <input type="text"/> <i>If all or part of your claim is secured, enter the secured amount (Box 4 on claim)</i>	Priority <input type="text"/> <i>If all or part of your claim is entitled to priority, enter the priority amount (Box 5 on claim)</i>	Unsecured 5990.55	Unknown 1000.00
Allowed				
Amount Allowed	Secured	Priority		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Description:				
Remarks: amended on Oct 31, 2008 to designate value unknown.				

The appearance of the Claims Register will also change, only displaying the total Amount Claimed, Secured Claimed, and Priority Claimed for **new** claims filed.

SDSD Claims Register		
<u>10-10001 Xenon Black and Savannah Black</u>		
Judge: Lillian Strasberg	Chapter: 13	
Office: Pleasantville	Last Date to file claims: 05/20/2010	
Trustee: Sam J. Carson	Last Date to file (Govt): 07/19/2010	
Creditor: (22555) Ace Finance 7121 W. Hwy 90 San Antonio TX 78227	Claim No: 1 Original Filed Date: 02/01/2010 Original Entered Date: 02/01/2010 Last Amendment Filed: 03/19/2010 Last Amendment Entered: 03/19/2010	Status: Filed by: CR Entered by: Deanna Liska Modified: 02/01/2010
Amount claimed: \$150000.00 Secured claimed: \$125000.00 Priority claimed: \$25000.00		
History: Details 1-1 02/01/2010 Claim #1 filed by Ace Finance, Amount claimed: \$250000 (Liska, Deanna) Details 1-2 03/19/2010 Amended Claim #1 filed by Ace Finance, Amount claimed: \$150000 (Liska, Deanna)		
Description: (1-1) House and Pool Loan - Deed of Trust (1-2) House and Pool Loan - Deed of Trust		
Remarks:		

Proofs of Claim

The Notice of Electronic Filing (NEF) will display the amounts in each area instead of just the total amount claimed.

The screenshot shows a Notice of Electronic Filing (NEF) from the U.S. Bankruptcy Court, Eastern District of Wisconsin (TEST). The page contains the following information:

- U.S. Bankruptcy Court**
Eastern District of Wisconsin (TEST)
- Notice of Electronic Filing**
- The following transaction was received from mrh, Deputy Clerk:**
- File another claim** (circled in red)
- Case Name:** Wells Fargo
- Case Number:** 11-20320-svk
- Creditor Name:** c/o Attorney Norah Jones, 300 River Walk, San Diego, CA 55555
- Claim Number:** 2 (circled in red)
- Amount Claimed:** \$50000.00
- Amount Secured:** \$25000.00
- Amount Priority:** (circled in red)
- The following document(s) are associated with this transaction:**
- Document description:** Main Document
- Original filename:** Test Document.pdf
- Electronic document Stamp:** [STAMP bkecfStamp_ID=993660899 [Date=11/28/2011] [FileNumber=66922-0] [a800c295540a90f9d409e8422a5219ecd8a2965cf2787cf594334f84f95b8480e32cf88b144b4d852691ddb977b916f3e274d2a4c8f13c0acd215a7ff34299c]]

Annotations on the form:

- A yellow callout box points to the "File another claim" link with the text: "File Another Claim" option moved to top of page.
- A yellow callout box points to the "Amount Claimed", "Amount Secured", and "Amount Priority" fields with the text: "Amounts are displayed in each area, not just the total amount claimed."

How will the Bankruptcy Clerk's Office handle the revised Proof of Claim forms?

Internally filed Proof of Claim forms - Case managers will extract dollar amounts directly from:

- Box 1 - Amount of Claim (Total)
- Box 4 - Secured Portion of Claim
- Box 5 - Priority Portion of Claim

Case managers **will not** complete any adding or subtracting to determine the total amount of the claim (if the claimant does not list a dollar amount in Box 1).

Externally filed Proof of Claim forms - Case managers will continue to perform quality assurance of all claims filed with the clerk's office to ensure the claim is filed in the correct case, the claim displays the correct case number, and that the claim (and attachments) do not contain personal information. The case managers **will not** change any dollar amounts if incorrectly entered into CM/ECF. Although a comparison will be made from the Proof of Claim form itself to the data entry, if there is a discrepancy in the dollar amounts, the case manager will make a remark in the Claims Register as to the discrepancy.

Mortgage Payment Modifications

Rule 3002.1 becomes effective December 1, 2011 and will be implemented in the Eastern District of Wisconsin on Monday, December 5, 2011. This rule is for the protection of the debtor and the creditors' interest in the event of changes to the mortgage payments under the plan that affect Chapter 13 debtors. This rule provides for Chapter 13 debtors to cure a default and maintain payments on their principal residence during the plan.

This rule applies to claims that are (1) secured by a security interest in the debtor's principal residence; and (2) provided for under 1322(b)(5) of the Code in the debtor's plan.

This rule will aid in the implementation of 11 U.S.C. 1322(b)(5), which permits a Chapter 13 debtor to cure a default and maintain payments on a home mortgage over the course of the debtor's plan. It applies whether the trustee or the debtor is the disbursing agent for the post-petition mortgage payments. If the post-petition payment obligation changes over time, notice of any change in the payment needs to be conveyed to the debtor and the trustee. Timely notice of these changes will permit the debtor or trustee to challenge the validity of any charges, if applicable, and to adjust the post-petition mortgage payments to cover any undisputed charges. The process also provides a way for the mortgage creditor to inform the debtor of changes in post-petition payment obligations without fearing that they will violate the automatic stay.

Creditors will file three new supplements to a Proof of Claim:

- **Notice of Mortgage Payment Change** (Bankruptcy/Claim Actions)
If there is a change in payment, including any change that results from an interest rate or escrow account adjustment, the creditor must file and serve on the debtor, debtor's attorney, and trustee.
- **Notice of Postpetition Mortgage Fees, Expenses, and Charges** (Bankruptcy/Claim Actions)
The rule also requires the creditor to file and serve on the debtor, debtor's attorney, and trustee an itemized notice of any post-petition fees, expenses, and charges that the creditor asserts are recoverable from the debtor or against the debtor's principal residence (e.g., inspection fees, late charges, attorney's fees).
- **Response to Notice of Final Cure Payment** (Bankruptcy/Claim Actions)
This document must be filed and served on the debtor, debtor's attorney, and trustee indicating (1) whether the creditor agrees the debtor has paid in full the amount required to cure the default on a claim; and (2) whether the debtor is otherwise current on all payments consistent with 1322(b)(5).

These new events are **supplements** to a Proof of Claim and **will only appear on the Claims Register**, not on the public docket. There will be no document number associated with these documents, only a link named, "**doc**." This link will appear on the Notice of Electronic Filing (NEF).

Mortgage Payment Modifications

We have also created several new events for the **trustees**:

- **Notice of Final Cure Mortgage Payment** (will only appear on Claims Register)
(Bankruptcy/Claim Actions)
- **Motion to Determine Mortgage Fees and Expenses**
(Bankruptcy/Motions-Applications)
- **Motion to Determine Final Cure and Mortgage Payment Rule 3002.1**
(Bankruptcy/Motions-Applications)

Please see the Attachment for a more detailed break down regarding the Mortgage Payment Modifications (minus pages only relevant to Court users) as provided by the Office of Information Technology, Systems Deployment and Support Division, Training Branch.

Noticing

E-Mail Addresses

When updating e-mail addresses in user accounts, users will be prompted to enter both primary and secondary email addresses twice; the address is not saved until the fields match.

Reminder - it is imperative that CM/ECF Account information is always current. Please refer to our Bounced Email Policy outlined in the CM/ECF Administrative Procedures.

Opportunity to Decline Notices of Electronic Filing

Attorneys who represent parties in an adversary proceeding now have the option to choose whether they want e-mail notifications of bankruptcy activity if they have no direct involvement in the bankruptcy case. Currently, these attorneys receive all e-mail notifications from both cases. In the menu selection “Maintain Your ECF Account,” “Email information,” attorneys can select this new option to decline notification for related bankruptcy cases.

Email information for Dayne L. Tracy II

Primary email address Reenter primary email address

Secondary email address Reenter secondary email address

Send the notices specified below

☒ to my primary email address

☐ to the secondary addresses

☒ Send notices in cases in which I am involved

☐ Send notices in these additional cases

☒ Send notices for adversary proceedings in which I am directly involved and for their related bankruptcy cases

☐ Send notices for adversary proceedings in which I am directly involved but not for their related bankruptcy cases

You may receive notices for some bankruptcy cases if it is required by the Clerk of Court.

☒ Send a notice for each filing

☐ Send a Daily Summary Report

Format notices ☒ HTML ☐ Text

Noticing

Combining Noticing Recipients on BNC Certificates of Notice

When a pleading is noticed through the Bankruptcy Noticing Center (BNC) and by CM/ECF Notices of Electronic Filing (NEF), users will no longer have to look in two locations to determine who was noticed. The BNC Certificate of Notice will display noticing activity for both methods. Case participants who were noticed in CM/ECF by electronic mail will be appended to the BNC Certificates of Notice.

Terminated Parties

Previously, when a party was terminated, the terminated party did not receive notice of the event. Now the terminated party is included in the noticing list for that one event.

RSS Feed

External users will be given the opportunity to subscribe to a Really Simple Syndication (RSS) Feed, which will allow that user to have links to the docket sheet and documents. A standard RSS reader is not provided with CM/ECF, but the software supports the readers included with the standard supported browsers (e.g., Internet Explorer, Firefox).

The first step to subscribe to the RSS Feed is to click the CM/ECF logo at the top left portion of the CM/ECF main page.




A Court Summary screen will appear. Next, click the **Further court information** link.



RSS Feed

The top portion of the Court Information screen displays here. Next, click the **Entries made in the last 12 hours - Public Users** link.

Court Information	
Court Details	
Court's Name	Eastern District of Wisconsin(TEST)
Software Version	CM/ECF-BK V4.2.0
ECF Go Live Date	[CM/ECF date]
Maximum PDF File Size (MB)	91
Maximum Merge Document Size (MB)	1
RSS Feed	 Entries made in the last 12 hours - Public Users
Docket entries of type: all	
PDF/A Compliance Required	

Some courts may select to activate only some event types to appear in the feed; however, the Eastern District of Wisconsin has activated **all** types of events. An entry will be made to the RSS Feed every time a docket entry is made. Clicking on the link displays brief details of recent events in the case, along with a list of event types that have been activated by the court, as shown below:

Eastern District of Wisconsin(TEST) - Recent Entries
Docket entries of type: all
11-20320-svk Debtor For This Case Tuesday, November 29, 2011 1:22 PM Type: bk Office: 2 Chapter: 13 Trustee: Grace, Michelle [Notice of Final Cure Mortgage Payment] (3)
11-20320-svk Debtor For This Case Tuesday, November 29, 2011 1:16 PM Type: bk Office: 2 Chapter: 13 Trustee: Grace, Michelle [Notice of Post Petition Mortgage Fees, Expenses, and Charges] (doc)
11-20320-svk Debtor For This Case Tuesday, November 29, 2011 1:10 PM Type: bk Office: 2 Chapter: 13 Trustee: Grace, Michelle [Notice of Mortgage Payment Change] (doc)
11-20001-svk Amy L. Westrich Tuesday, November 29, 2011 1:04 PM Type: bk Office: 2 Chapter: 7 Trustee: Bear, Panda [Notice of Final Cure Mortgage Payment]

RSS Feed

At any given time, the feed displays all entries (listed at the top of the RSS Feed output) that have been docketed within the last 12 hours.

From the screen shown above, you may subscribe to the feed if you have configured third-party software.

There is no fee for the initial RSS Feed report. However, if you click on the case number hyperlink to view the docket sheet, or the document number hyperlink to view the document, you will be prompted to log into PACER, and will incur the standard PACER fees for any information accessed through CM/ECF.